Team,

I wanted to take a few minutes to share an update on the technology work happening behind the scenes at the firm. We're building toward a more connected way of working - one where our data, our client tools, and our AI resources actually talk to each other instead of living in silos. Three initiatives sit at the center of that effort: **intelliGPT**, **intelliPilot**, and the **MileMarker Data Lake**. Two are already live, and one is under active development. Here's where each one stands.

intelliGPT - Live Now

Our Private AI Workspace

If you have completed your AI disclosure, you already have access to this one: intelliGPT is our private AI workspace, available firm-wide today for research, drafting, and everyday productivity. At its core is **Chat**, a conversational assistant with a choice of models, file uploads, and a Files panel to keep track of your work. Around that, **Projects** let you group related chats into folders that share files, instructions, and context across a workstream, while **Cowork** handles hands-off, multi-step runs that produce finished documents with minimal back-and-forth on your part. **My Settings** rounds it out, letting you manage your personal profile, memory, and preferences so the assistant adapts to how you work.

If you haven't spent time in it yet, I'd encourage you to. It's already saving people real time.

intelliPilot – Live Now

The Advisor Experience Overlay

This is the one I'm most excited about long-term. intelliPilot is the application layer we're building that will reside on top of the MileMarker Data Lake - it will bring the tools our teams use to serve clients into one connected overlay instead of scattered systems. That overlay will include **Playbook/Snapshot**

and **Launchpad**, a holistic, single-screen view of the client that brings relationships, accounts, and activity into one place. It will also include a **Meetings** workspace, built in the spirit of Jump.ai, to support meeting prep, notes, and follow-through around client conversations, with additional modules planned as the overlay matures.

MileMarker Data Lake - Foundational Build Underway

Our Centralized Data Repository

MileMarker will be our centralized data repository - pulling together data from all of our systems and relating all the data points to each other, so we're working from one connected data foundation instead of reconciling scattered, disconnected system-level data. Done well, it becomes our single source of truth, reducing how much we rely on manually reconciling data across separate platforms, and it gives us a connected data model that links related information across systems; for example, tying a client record to its accounts, activity, and documents no matter where each one actually lives. Most importantly, it's the foundation for what's next: **MileMarker** is the data layer that **intelliPilot**, and future tools after it, will be reside on top of.

This is the groundwork. It's not flashy, but nothing above it works without it.

How These Three Fit Together

It helps to think of these as layers rather than three separate projects. The **MileMarker Data Lake** is the data foundation, connecting data across all of our firm systems. **intelliPilot** is the application layer sitting on top of it - the client-facing overlay that includes Playbook/Snapshot, Launchpad, and Meetings. And **intelliGPT** is a separate, AI workspace for firm-wide productivity, research, and drafting, independent of the other two – which will ultimately reside on top of MileMarker as well.

What This Means for You Right Now

There's no action needed today - consider this an awareness and status update. **intelliGPT** and **intelliPilot** are available now, so I'd encourage you to explore Chat, Projects, and Cowork as part of your regular workflow. **MileMarker** is underway, and I'll keep you posted with further updates, timelines, and training as each nears rollout. If you have questions in the meantime, reach out to me - I'm happy to talk through any of this.

This is a lot of foundational work you won't see day-to-day, but it's setting us up for tools that will make a real difference in how we work and how we serve clients.

Thank you for being a part of this amazing adventure we are all on together – I am so excited to see where we can collectively take this!

-Nicholas Holmes

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quality
"A" papers

innovation
pioneers

courage
willing to be first

passion
love for what we do

collaboration
play well with all

core values

resources + reminders spotlight

give your benefits a check-in:
Before open enrollment begins, take a quick look at your current coverage, dependents and elections so you're ready when it's time to make your selections.

access employee nav

day of serving is coming up
Our intellicents Day of Serving is tomorrow, October 2! Check in with Mandie Scott or Maranda Tufte if you don't have information on your location activity.

upcoming events

intellitraining - finance

october 6

9 am central

cultural enrichment committee

october 12

1 pm central

intellicast webinar

october 13

12 PM central

employee highlights

happy birthday!

Ramsey Brown - 10/6
Kevin Mahoney - 10/9
Hope Schuman - 10/9
Molly Magnuson - 10/10
Bill Wagemaker - 10/12
Brian Paulsen - 10/13
Skylar Kelly - 10/16
Sue Larson - 10/17
Chris Whittaker - 10/25
Jamie Dahmen - 10/26
Matthew Palmer - 10/29
Tanner Palmer - 10/29

happy anniversary!

Mandie Scott - 10/1 - 20 years
Rob Mastel - 10/1 - 1 year
Jared Goforth - 10/7 - 7 years
Jacob Reiter - 10/7 - 1 year
Connie McCleary-Geiger - 10/8 - 2 years
Matt Palmer - 10/14 - 5 years
Robin Vink - 10/18 - 5 years
Bill Wagemaker - 10/20 - 1 year

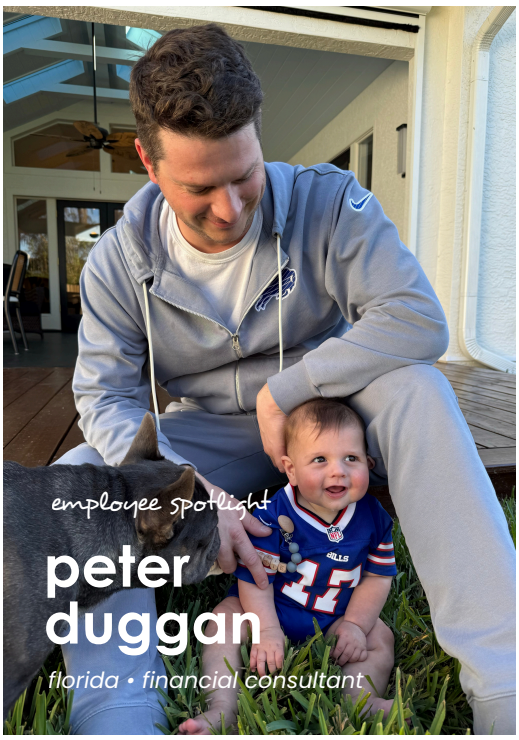
team spotlights

YMCA women's expo | albert lea
The AL crew is out and about! A few familiar intellicents faces joined the YMCA Women's Expo for a night of connection, conversation, and community.

We're excited to see our team showing up, getting involved and representing intellicents in the community.

logan | team player
Logan has really taken initiative in stepping up to grasp our operational systems, leading the fixes, and still helping out the Group Insurance department when needed. He is a true team player.
shoutout by Nicholas Holmes

brent behrens | vp of finance
Jimmy is joining our team as the Executive VP of Finance.
Welcome to the team!



What's your hometown? Buffalo

Do you have kids? I have a son, Charlie. He is 7 months old!

How do you like to spend your free time? Outside of spending time with my family, I love going to concerts, golfing, and watching Josh Allen hurdle Kansas City Chiefs DB's.

What is your favorite guilty pleasure TV show or movie? The greatest TV show of all time, The Sopranos.